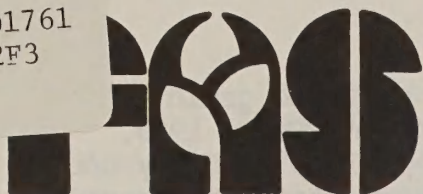


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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 39-82

WASHINGTON, Sept. 29--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following recent developments in world agriculture and trade:

GRAIN AND FEED

ARGENTINA recently signed a trade agreement with Cuba to supply 100,000 tons of corn annually during 1982-85. The agreement also includes annual minimum shipments of soybean meal, dry beans, tallow and non-fat dry milk. Reportedly no credit arrangements are included and sales will be based on prevailing international market prices. Argentina exported about 100,000 tons of corn to Cuba in calendar 1981.

AUSTRIA is likely to export nearly 600,000 tons of wheat this season, double any previous level, as a result of expectations of a near-record grain outturn. East Germany and Yugoslavia may import the bulk of excess Austrian supplies. Austrian domestic prices are well above current world prices, indicating government subsidies on Austrian wheat exports this season may reach about \$35 million.

DAIRY, LIVESTOCK AND POULTRY

As a result of recent large increases in the domestic price of beef in ARGENTINA, exporters who previously signed contracts for shipments overseas are being forced to suspend some of those deals. In early September, the domestic price of beef rose 34 percent, making it uneconomical for exporters to fulfill their commitments. While beef exporters attempt to get the government of Argentina to take some action to correct the export margins, some shipments lay idle. Among those beef contracts involved to date are 5,700 tons to Egypt, 2,750 tons to Algeria, and a total of 7,500 tons to the Soviet Union and Israel.

SWEDEN announced on September 15 that it would discontinue the ban on imports of meats from Denmark, which was issued on March 18, 1982. The ban was imposed after the outbreak of foot and mouth disease in Denmark. Sweden normally imports about 2,000 tons of beef and pork from Denmark, but since the import ban, has turned to meat from Canada and Ireland.

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In POLAND, production incentives and a larger domestic grain crop could produce a 9 percent recovery in poultry meat production during 1983. The Ministry of Agriculture and Food, which controls the poultry industry and programs, is trying to increase poultry production on private farms by supplying them with chicks and feed concentrates.

Poland's broiler industry, which relied heavily on imported feeds, has been severely affected by credit restrictions. Many large operations have been forced to stop production completely. In the first 5 months of 1982, production of slaughter poultry in the State sector was down 56 percent compared with the same period in 1981. May production was down more than 80 percent from a year ago. Poultry meat output this year is projected to drop 67 percent from the 1981 record of 461,000 tons.

JAPAN's pork production in June was below year-ago levels for the first time this year, suggesting producers are starting to react to favorable hog/feed price ratios by holding back gilts for breeding. Total production in the first half of 1982 was 3 percent above year-ago levels, but production in May was only 1 percent above last year's level. Should this trend continue, total pork production this year could fall slightly below current projections.

COTTON AND FIBERS

In an effort to reduce INDIA's surplus stocks of extra-long staple cotton, particularly varalaxmi, the Maharashtra State Cooperative Marketing Federation (MSCMF) sponsored a trade visit by two officials to China, Japan, Korea and Hong Kong during the first week in September. The MSCMF is currently carrying excess stocks of about 100,000 bales of varalaxmi.

In an effort to stimulate COLOMBIAN exports of cotton and textiles, the government will increase the export tax rebate from 9 to 15 percent of the f.o.b. export value.

Sentitive to further criticism over trade issues, JAPAN continues to maintain its open market for cotton and products, and has shown no signs of interest thus far in the textile industry's requests to negotiate bilateral agreements within the Multi-Fiber Arrangement or otherwise regulate cotton goods imports.

-more-

ZIMBABWE announced that clothing imports from Botswana would be removed from open general import licensing, which exempts goods from customs duties and import quotas. An import quota was established and licenses issued against the quota, effective Sept. 10, 1982. Zimbabwe's textile industry requested protection from rising imports, citing slow domestic demand and faltering sales.

SYRIA's 1982/83 cotton crop is expected to register a 6 percent increase over the previous year's revised estimate of 595,000 bales, according to the U.S. agricultural attache in Damascus. The increased production and acreage expansion are in response to a 20 percent increase in procurement prices. In addition, improved seeds, the use of fertilizer, and better pest control and cultural practices have had a positive impact. The upward trend in cotton production is expected to continue due to the government's strong support of the cotton industry.

NIGERIA's 1982/83 cotton crop is expected to be approximately 9 percent greater than the previous year's revised estimate of 92,000 bales, according to the U.S. agricultural attache in Lagos. While area increased about 12 percent this year, high cash returns for food and a shortage of labor have led to a general downtrend in cotton production since the late 1960s. In an effort to prevent further declines in cotton production, the Nigerian Cotton Board hopes to establish large-scale mechanized cotton farms in ten states.

ISRAEL's 1982/83 cotton production is expected to be down nearly 7 percent from last year's revised estimate of 335,000 bales, according to the U.S. agricultural attache in Tel Aviv. The reduction is largely attributed to the declining profit from cotton production, resulting in a shift to grain sorghum, peanuts and sunflowers. Adverse weather conditions have also affected output. This downward trend is expected to continue unless world cotton prices become more attractive.

TOBACCO

ZIMBABWE's Tobacco Marketing Board has lowered its estimate of the 1982 flue-cured tobacco crop to 89,000 tons. However, the crop is still forecast to be nearly 33 percent above 1981 production. Reportedly, August marketings of the flue-cured crop were of high quality.

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SUGAR

The UNITED KINGDOM's 1982/83 sugarbeet crop has been grown under near perfect conditions, pointing to a record crop of nearly 1.5 million tons of sugar, raw value. Pre-harvest samples indicated the crop contains more sugar than at any time in the past 5 years. Beet yields were estimated at more than 43 tons per hectare. The harvest was scheduled to begin on September 20.

FRUITS AND NUTS

SPAIN's first official estimate of 1982/83 citrus production places the new season crop 1.5 percent above the 1981/82 harvest. However, drought conditions and scattered hailstorms have reportedly caused some quality problems. Data are as follows in tons:

	1982/83	1981/82
Sweet oranges	1,692,450	1,629,000
Bitter oranges	19,440	18,000
Tangerines	838,650	838,650
Lemons	426,500	450,000
Grapefruit	11,650	10,000
Total	2,988,690	2,945,650

In ISRAEL, extensive plantings of new avocado groves over the past several years have resulted in a fairly steady growth in avocado output. The 1982/83 crop is currently estimated at a record 52,000 tons, 41 percent greater than the bumper 1981/82 harvest. Expansion in both area and production is expected to continue, with total output projected to reach approximately 90,000 tons by 1990.

RECENT FOREIGN AGRICULTURE CIRCULARS

World Tobacco Situation, FT 9-82
World Cotton Situation, FC 10-82
World Oilseed Situation and U.S. Export Opportunities, FOP 11-82
U.S. Meat and Dairy Imports for June and July 1982, FDL MT 8-82

TO ORDER, CONTACT: U.S. Department of Agriculture, FAS Information Services Staff, 5918-South, Washington, D.C. 20250. Tel. (202) 447-7937.

Rotterdam Prices and E.C. Import Levies:

Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	: : Sept. 28, 1982 :	: : Change from : previous week :	: : A year : ago :	
	\$ per m. ton	\$ per bu.	¢ per bu.	\$ per m. ton
Wheat				
Canadian No. 1 CWRS-13.5%..... 1/		1/	1/	214.00
U.S. No. 2 DNS/NS: 14%.....173.00		4.71	-.01	187.50
U.S. No. 2 DHW/HW: 13.5%..... 1/		1/	1/	201.00
U.S. No. 2 S.R.W.....138.00		3.76	-0-	179.00
U.S. No. 3 H.A.D.....166.00		4.52	-0-	187.00
Canadian No. 1 A: Durum..... 1/		1/	1/	218.00
Feed grains:				
U.S. No. 3 Yellow Corn.....106.00		2.69	-0-	130.00
U.S. No. 2 Sorghum 2/..... 1/		1/	1/	142.50
Feed Barley 3/..... 1/		1/	1/	148.00
Soybeans:				
U.S. No. 2 Yellow.....214.20		5.83	1/	255.50
Brazil 47/48% Soya Pellets 4/.202.00		--	-.50 5/	1/
U.S. 44% Soybean Meal (MT)....191.50		--	-6.50 5/	228.00
EC Import Levies				
Wheat 6/.....102.94		2.80	-.14	72.20
Barley..... 97.25		2.12	-.02	74.45
Corn.....104.13		2.65	-.03	92.00
Sorghum..... 97.70		2.48	+.03	76.10

1/ Not available. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Dollars per metric ton. 6/ Durum has a special levy.

Note: Basis October delivery.

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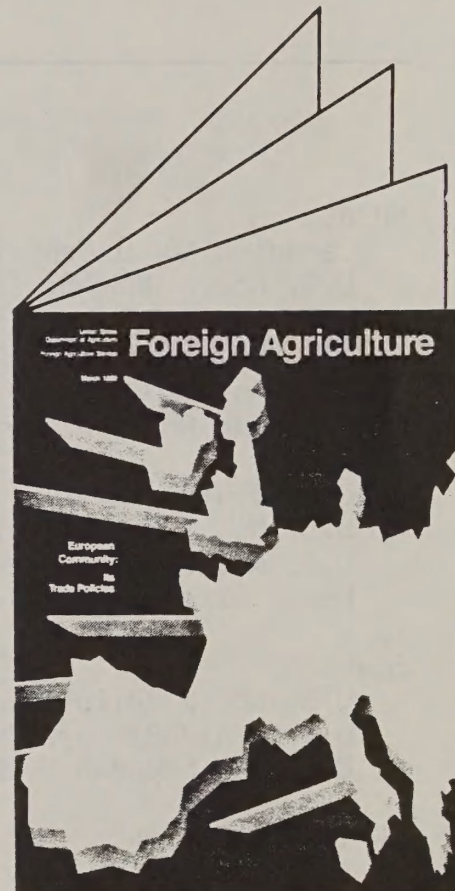
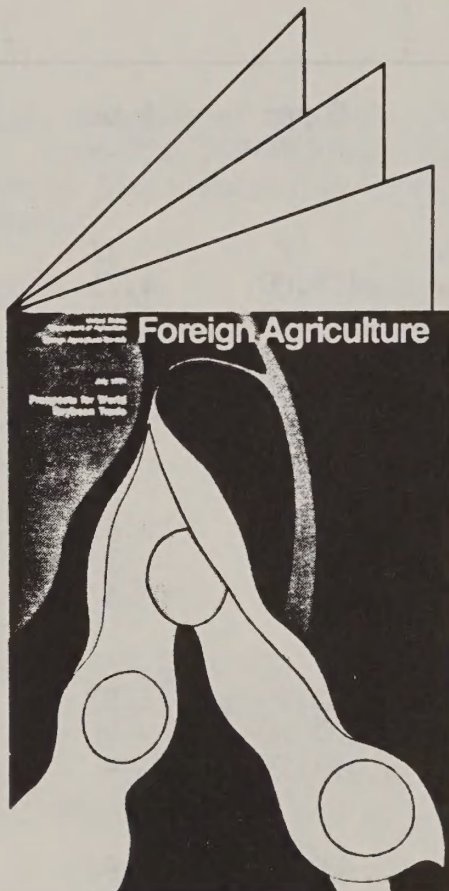
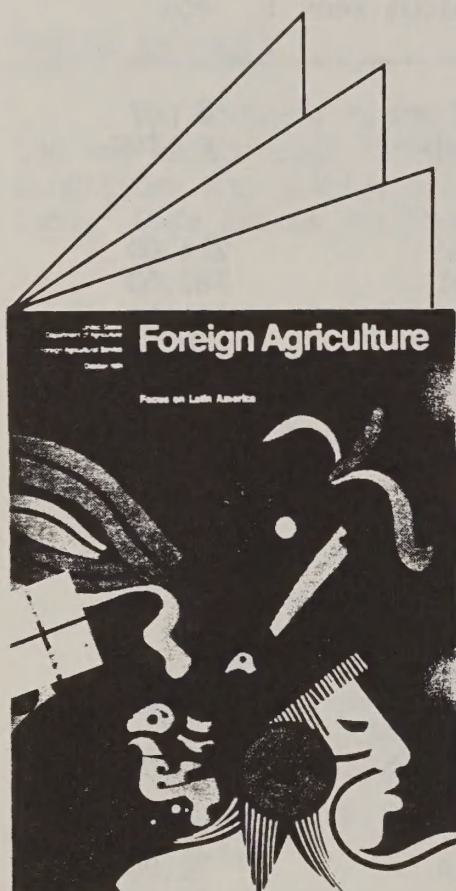
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